

Consumer Expenditure Survey: Quarterly Data from the Interview Survey, Fourth Quarter 1998



U.S. Department of Labor
Bureau of Labor Statistics
February 2000

Report 942

Average annualized expenditures rose 2.1 percent from the fourth quarter of 1997 to the fourth quarter of 1998. (See table A.) This was about half the 4 percent quarter-to-quarter increase the previous year. Among the major expenditure components, spending on transportation rose the most, 10.1 percent, in fourth quarter 1998 from the fourth quarter of 1997. This was due to a 29 percent increase in vehicle purchases. There was a 3.5-

percent increase in spending on personal insurance and pensions, somewhat smaller than the previous year's increase of 4.6-percent. Housing expenditures rose moderately at 2 percent. Food had a minimal gain of 0.5 percent compared to a 3.5-percent gain the prior year. Health care expenditures was basically unchanged with a .1 percent increase compared to a 5.2 percent increase last year. The other categories of expenditures: apparel and services, entertainment, and other expenditures all had decreases after increasing the previous year. Apparel and services decreased 5.7 percent, entertainment 2.7 percent, and all other expenditures, consisting of alcoholic beverages, personal care products, reading materials, education expenses, tobacco products, cash contributions, and miscellaneous expenditures, 2.9 percent. Table B shows average quarterly (annualized) expenditures for the fourth quarters of 1992 through 1998. Data on the average quarterly expenditures (annualized) for consumer units classified by income quintiles, age of the reference person, and region of residence, appear in tables 1 through 3, respectively.

NOTE: This is the last in a series of reports showing quarterly data from the Consumer Expenditure Interview Survey. Quarterly data tables similar to those shown in this report will be available in the future upon request. Contact the Division of Consumer Expenditure Surveys at the address, phone, or e-mail address shown at the end of this report for further information.

Table A. Annualized fourth quarter expenditures of all consumer units and percent changes, Consumer Expenditure Survey, 1998-98

Item	Fourth quarter 1996	Fourth quarter 1997	Fourth quarter 1998	Percent change	
				1996-97	1997-98
Number of consumer units (in thousands)	104,611	106,420	107,623		
Income before taxes ¹	\$38,794	\$40,349	\$42,194		
Average age of reference person	47.6	47.7	47.4		
Average number in consumer unit:					
Persons	2.6	2.5	2.5		
Earners ²	1.3	1.3	1.3		
Vehicles	1.9	1.9	2.0		
Total expenditures	\$32,489	\$33,774	\$34,477	4.0	2.1
Food	4,880	4,846	4,889	3.5	0.5
Housing	10,290	10,834	11,050	5.3	2.0
Apparel and services	1,822	1,908	1,799	-4.7	-5.7
Transportation	6,108	5,996	6,599	-1.8	10.1
Health care	1,634	1,719	1,721	5.2	.1
Entertainment	1,765	1,831	1,879	9.4	-2.7
Personal insurance and pensions	3,147	3,292	3,408	4.6	3.5
Other expenditures	3,045	3,246	3,152	6.6	-2.9

¹ Income values are derived from "complete reporters" only; see Brief definitions in Technical Note.

² As of 1997, leased vehicles are included in Vehicles.

Table B. Selected average quarterly annualized expenditures¹ of consumer units, Interview survey, fourth quarters, 1993-96

Item	1992	1993	1994	1995	1996	1997	1998
Total expenditures	\$28,496	\$29,951	\$31,105	\$31,373	\$32,489	\$33,774	\$34,447
Food	4,317	4,438	4,438	4,518	4,680	4,846	4,889
At home	3,214	3,281	3,252	3,343	3,453	3,529	3,503
Away from home	1,103	1,157	1,186	1,175	1,228	1,318	1,386
Housing	8,768	9,207	9,648	9,958	10,290	10,834	11,050
Shelter	5,277	5,428	5,888	5,947	6,099	6,409	6,775
Owned dwellings	3,230	3,342	3,738	3,778	3,874	4,026	4,309
Rented dwellings	1,746	1,738	1,818	1,837	1,871	2,031	2,082
Other lodging	301	350	313	331	355	351	404
Utilities, fuels, and public services	2,010	2,158	2,128	2,230	2,382	2,398	2,395
Housefurnishings and operations	1,481	1,622	1,653	1,780	1,808	2,028	1,880
Apparel and services	1,846	1,857	1,805	1,782	1,822	1,908	1,799
Transportation	5,212	5,463	5,743	6,016	6,108	5,996	6,599
Vehicle purchases	2,229	2,461	2,531	2,746	2,639	2,408	3,110
Gasoline and motor oil	974	953	987	987	1,058	1,058	985
Other transportation expenses	2,008	2,050	2,225	2,303	2,409	2,530	2,504
Health care	1,553	1,624	1,636	1,665	1,634	1,719	1,721
Entertainment	1,634	1,753	1,753	1,659	1,765	1,931	1,879
All other expenses ²	5,185	5,609	6,081	5,777	6,192	6,538	6,580

See footnotes at end of tables.

Table 1. Quintiles of income before taxes: Average quarterly expenditures¹ of all consumer units, Interview survey, fourth quarter, 1996

Item	All consumer units	Complete reporting of income						Incomplete reporting of income
		Total complete reporting	Lowest 20 percent	Second 20 percent	Third 20 percent	Fourth 20 percent	Highest 20 percent	
Number of consumer units (in thousands)	107,623	82,484	16,464	16,498	16,491	16,500	16,530	25,140
Number of sample units	6,248	4,827	950	957	968	975	977	1,421
Consumer unit characteristics:								
Income before taxes ¹	\$42,194	\$42,194	\$6,966	\$18,022	\$31,104	\$50,852	\$103,827	(*)
Age of reference person	47.4	47.5	49.8	52.0	46.6	43.4	45.7	47.3
Number in consumer unit:								
Persons	2.5	2.5	1.7	2.3	2.5	2.9	3.1	2.6
Children under 18 .....	.7	.7	.4	.6	.7	.8	.9	.7
Persons 65 and over .....	.3	.3	.4	.5	.4	.2	.1	.3
Earners	1.3	1.3	.7	.9	1.3	1.7	2.1	1.3
Vehicles	2.0	2.0	1.0	1.5	2.0	2.4	2.9	1.9
Total expenditures	\$34,477	\$36,023	\$15,316	\$24,037	\$30,717	\$42,394	\$87,546	\$29,406
Food	4,869	4,880	2,812	3,749	4,528	5,492	7,809	4,832
Housing	11,050	11,151	5,708	7,969	9,611	12,493	19,944	10,722
Shelter	6,775	6,803	3,453	4,928	5,876	7,595	12,145	8,686
Owned dwellings	4,309	4,290	1,164	2,068	3,215	5,054	9,932	4,371
Rented dwellings	2,062	2,117	2,159	2,631	2,421	2,144	1,232	1,863
Other lodging	404	396	130	229	240	397	982	431
Utilities, fuels, and public services	2,395	2,374	1,508	1,980	2,298	2,893	3,389	2,464
Housefurnishings and operations	1,880	1,974	747	1,061	1,440	2,205	4,410	1,573
Apparel and services	1,799	1,860	778	1,056	1,611	1,972	3,877	1,597
Transportation	6,599	6,838	2,376	4,956	6,079	8,541	12,219	5,816
Vehicle purchases	985	1,003	480	720	995	1,272	1,545	927
Gasoline and motor oil	985	1,003	480	720	995	1,272	1,545	927
Other transportation expenses	5,614	5,836	1,898	4,236	5,085	7,269	10,674	4,889
Health care	1,721	1,796	1,008	1,782	1,635	1,945	2,627	1,476
Entertainment	1,879	1,919	732	1,232	1,525	2,394	3,703	1,748
All other expenses ²	6,560	7,560	1,902	3,314	5,727	9,558	17,388	3,215

See footnotes at end of tables.

Table 2. Age of reference person: Average quarterly expenditures¹ of all consumer units, interview survey, fourth quarter, 1968

Item	All consumer units	Under 25	25-44	45-64	65 and over
Number of consumer units (in thousands)	107,623	8,832	43,751	33,546	21,495
Number of sample units	6,248	524	2,489	1,967	1,266
Consumer unit characteristics:					
Income before taxes ³	\$42,194	\$16,439	\$47,809	\$53,993	\$24,150
Age of reference person	47.4	21.3	35.1	53.2	74.4
Number in consumer unit:					
Persons	2.5	1.7	3.0	2.5	1.8
Children under 18 .....	.7	.3	1.2	.4	.1
Persons 65 and over .....	.3	(1)	(1)	.1	1.4
Earners	1.3	1.2	1.6	1.6	.4
Vehicles	2.0	1.0	2.0	2.4	1.6
Total expenditures	\$34,477	\$17,286	\$37,211	\$41,980	\$24,307
Food	4,869	2,900	5,199	5,680	3,738
Housing	11,050	5,641	12,677	12,349	7,938
Shelter	6,775	3,698	8,007	7,480	4,484
Owned dwellings	4,309	397	4,938	5,438	2,874
Rented dwellings	2,062	3,179	2,821	1,333	1,198
Other lodging	404	121	248	689	385
Utilities, fuels, and public services	2,395	1,132	2,428	2,811	2,198
Housefurnishings and operations	1,880	811	2,242	2,078	1,275
Apparel and services	1,799	1,110	2,105	2,095	994
Transportation	6,599	3,726	6,688	8,847	4,133
Gasoline and motor oil	985	612	1,085	1,180	630
Other transportation expenses	5,614	3,113	5,583	7,667	3,503
Health care	1,721	372	1,309	2,001	2,679
Entertainment	1,879	1,038	2,175	2,211	1,103
All other expenses ²	6,560	2,480	7,078	8,778	3,723

See footnotes at end of tables.

Table 3. Region of residence: Average quarterly expenditures¹ of all consumer units, interview survey, fourth quarter, 1968

Item	All consumer units	Northeast	Midwest	South	West
Number of consumer units (in thousands)	107,623	20,750	25,489	37,261	24,124
Number of sample units	6,248	1,144	1,521	2,010	1,573
Consumer unit characteristics:					
Income before taxes ³	\$42,194	\$46,602	\$42,225	\$38,643	\$43,803
Age of reference person	47.4	48.8	48	47.3	45.9
Number in consumer unit:					
Persons	2.5	2.5	2.4	2.5	2.5
Children under 18 .....	.7	.6	.5	.7	.7
Persons 65 and over .....	.3	.3	.3	.3	.3
Earners	1.3	1.3	1.4	1.3	1.3
Vehicles	2.0	1.7	2.1	1.9	2.0
Total expenditures	\$34,477	\$36,391	\$33,276	\$31,982	\$37,855
Food	4,869	5,176	4,704	4,633	5,142
Housing	11,050	12,501	10,513	9,474	12,808
Shelter	6,775	8,126	6,261	5,335	8,382
Owned dwellings	4,309	5,118	4,267	3,347	5,142
Rented dwellings	2,062	2,541	1,811	1,688	2,706
Other lodging	404	467	382	301	534
Utilities, fuels, and public services	2,395	2,473	2,435	2,481	2,152
Housefurnishings and operations	1,880	1,902	1,817	1,658	2,271
Apparel and services	1,799	2,199	1,679	1,646	1,817
Transportation	6,599	6,394	6,140	6,623	7,225
Gasoline and motor oil	985	883	989	1,015	1,044
Other transportation expenses	5,614	5,511	5,171	5,608	6,181
Health care	1,721	1,581	1,912	1,798	1,524
Entertainment	1,879	2,023	1,934	1,665	2,026
All other expenses ²	6,560	6,517	6,384	6,146	7,415

¹ These expenditures are estimates for a particular quarter presented at annual rates. (Values are multiplied by 4.)² Includes alcoholic beverages, reading, education, tobacco, miscellaneous expenditures, personal care, cash contributions, personal insurance and

pensions.

³ Income values are derived from "complete reporters" only; see Technical Note.⁴ Value less than 0.05.

Technical Note

Data in this report are from the Interview portion of the Consumer Expenditure Survey, conducted by the Bureau of the Census for the Bureau of Labor Statistics. This survey consists of two components: (1) a Diary or recordkeeping survey completed by respondents for two consecutive 1-week periods, and (2) an Interview survey in which the expenditures of consumer units are obtained in five interviews conducted every 3 months. Data are collected in independent samples of consumer units that are representative of the U.S. population. The Interview sample, selected on a rotating panel basis, consists of approximately 5,000 consumer units each quarter.

The Interview survey data, which covers approximately 95 percent of all expenditures, include large expenditures, such as property, automobiles, and major appliances, as well as expenditures that occur on a regular basis, such as rent, utility payments, or insurance premiums.

There are limitations to these data that should be mentioned. First, for some analytical uses, the data should be seasonally adjusted. In the absence of computed seasonal adjustment factors, one may make comparisons with the same quarter of the previous (or earlier) year. Second, for infrequently purchased items, there are fewer reports in a quarter than there are for a year. In order to obtain statistically reliable estimates, a sufficient level of reporting is required. Therefore, the tables based on quarterly data show less detail than those based on annual data. In addition, quarterly data tend to be more volatile than annual data.

Brief definitions

Consumer unit. (1) All members of a particular household who are related by blood, marriage, adoption, or other legal arrangements; (2) a person living alone or sharing a household with others or living as a roomer in a private home or lodging house or in permanent living quarters in a hotel or motel, but who is finan-

cially independent; or (3) two or more persons living together who share responsibility for at least 2 out of 3 major types of expenses—food, housing, and all other expenses. (The terms "household" or "consumer" may also be used.)

Complete income reporters. In general, a complete income reporter is a respondent who provided values for at least one of the major sources of income, such as wages and salaries, self-employment income, and Social Security income. (A complete income reporter may or may not provide a full accounting of all income from all sources.)

Total expenditures. These are the transaction costs, (including excise and sales taxes), of goods and services acquired during the interview period. Averages include expenditures for gifts and contributions and payments for pensions and personal insurance.

Quintiles of income before taxes. Complete income reporters are ranked in ascending order, according to the level of total before tax income reported by the consumer unit. The ranking is then divided into five equal groups. Incomplete income reporters are not ranked and are shown separately.

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For further information contact the Division of Consumer Expenditure Surveys, Bureau of Labor Statistics, Room 3985, 2 Massachusetts Avenue, NE, Washington, DC 20212-0001. Telephone: (202) 691-6900.

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